

Source: The New Hampshire Center for Public Policy Studies is reporting -- not verifying -- the information provided by proposal developers. The data come from materials submitted to the NH Gaming Commission as well as interviews with each of the proposal developers, all of whom have had a chance to review and comment.

Summary of Gaming Proposals (Working Draft)

Cost/Benefit Don	Domain Indicator	Berlin	Salem	Seabrook	Hudson
		Charitable Gaming	Millenium Gaming	Macomber	Sagamore Crossing
Proposal Design	General	A destination Casino heavily phased	Racino to include up to 5,000 VLTs at Rockingham Park and up to 60 Charitable Gaming Tables	Racino to include 2,000 VLTs, 2 restaurants (200 seat casual and 100-seat fine dining), charitable gaming section, entertainment center	Golf destination resort with hotel, convention center, with gaming and VLTs at state race tracks; 5,000 VLTs at tracks plus 4,000 Slots at Sagamore and 100 table games + comparable casino at Suffolk Downs
Proposal Design	Phasing	Phase 1: 250 VLT, 10 table games; Phase 2: 500 VLT, 20 table games, Phase 3: 1,000 VLT 25 table games -40,000 square feet, 300 room hotel and convention center	A Phase 1 Facility could have approximately 3000 VLTs and could open within 1 year of licensing	Renovation of existing 70,000 facility followed by the addition of a permanent gaming facility described above.	Assumes 18-month build out and full opening with all amenities. Revenue estimates are phased-in based on graduated hotel occupancy rates, win per day on slots and table games, and gradual increases in non-gaming revenues as facility matures.
Revenues	Revenue to State: Effective Gambling Tax Rate	30% - Noted that 49% would result in insufficient capital investment	40% - Based on D'Allesandro Bill	40% to state - Based on D'Allesandro Bill	Guarantee of \$50m revenue. Gaming tax revenue "estimates assume a 25% gaming tax on the resort's gross gaming revenue and a 50% tax on the racetrack's gross gaming revenues. New employment estimates for the racetracks are based on national averages."
Revenues	Impact on Lottery	Not provided, not discussed, or no analysis conducted.	No analysis conducted. Refer to Lottery Commission Statements on VLT's.	No specific NH analysis conducted. Hypothesize that the export focus (share of individuals coming from Massachusetts) would limit impact.	Includes review suggesting no to minimum impact

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Revenues	Impact on Charitable Gaming	Proposal includes dedicated charitable table gaming	Proposal includes dedicated charitable table gaming or commercial table gaming with dedicated charitable revenues	Proposal includes dedicated charitable tabling gaming. Expansion in tables and video lottery operations anticipated to increase benefits to charities.	Sagamore has stated that it considers charitable gaming a "feeder system" that complements its table games, since most casinos have a \$5-\$15 minimum bet on table games, while NH charitable gaming has a \$4 maximum bet. Sagamore proposed setting aside 5,000 sq. ft. of prime space for charitable gaming in its facility.
Revenues	Revenue to State: BPT/BET Impact	Not provided, not discussed, or no analysis conducted.	\$2m to \$3 million	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	Report produced by Phil Blatsos on behalf of Sagamore estimates \$0.6 million in BET and \$0.7 million in BPT. Additionally estimates \$2.1 million in state liquor store revenue.
Revenues	Revenue to Local Community (Property Tax)	Not provided, not discussed, or no analysis conducted.	\$3 to \$4 million (includes town, school, county)	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	No NH specific analysis conducted. Assumes additional infrastructure expenses will be funded by new revenues generated from gambling taxes.
Revenues	Revenue to State: Licensing Fees	Provisions in D'Allesandro bill regarding \$10m North Country license fee not possible. \$5,000 per machine instead.	\$50 million for Rockingham Park, based on legislation developed by Senator D'Allesandro.	Based on legislation developed by Senator D'Allesandro: \$20 million fee.	\$50 million license fee.

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Revenues	Revenue to State: Change in Meals and Rooms	Not provided, not discussed, or no analysis conducted.	\$1.7m to \$2.0 million	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	Estimate of .8m in meals and rooms tax.
Revenues	Revenue to State: Estimated impact on existing business meals and rooms tax	Not provided, not discussed, or no analysis conducted.	Increases due to 4 million visits will purchase other meals and rooms at other NH businesses (and tolls and toll taxes).	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	Resort will draw 81% of its patrons from out of state suggesting the export nature of the produce will bring additional revenues.
Revenues	Tax: Revenue to local or other	Phase 1 \$2.6 mill to State, \$300k to city, \$100k to county, \$260k to charity, \$100k to problem gaming	Tax 40% to state GF, 3% to town, 1% to county, 2% problem gaming, 1% tourism, 1% safety, 1% purse	As per Senator D'Allesandro bill: Tax 40% to state GF, 3% to town, 1% to county, 2% problem gaming, 1% tourism, 1% safety, 1% purse	1% to host town, and 15 mile radius, % to commuter rail, nothing for local police and fire
Revenues	Estimated Revenue	\$10 million , half to state and local in Phase 1	\$418,200,000	No estimate of overall revenues available.	\$531 gross gaming revenue, \$138 non-gaming revenue, = \$668 m
Revenues	Revenues Per VLT	\$109.59	\$229.15	\$170.00	\$293
Revenues	Estimated Growth Over Time	Not provided, not discussed, or no analysis conducted.	3-3.5% per year	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	Same as growth in discretionary spending

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Revenues	Impact of Massachusetts Expanded Gaming	Not provided, not discussed, or no analysis conducted.	31% Reduction in revenues (to \$286.9m)	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	58% Reduction in revenues (\$1.2b GGR to \$531m)
Social Costs	Pathological Gaming	No systematic analysis conducted. However, proposal includes 1% of revenue to support social service programs	No systematic analysis conducted. Proposal included 2% of revenue to fund social cost programs based on D'Allesandro bill	No systematic analysis conducted. Proposal included 2% of revenue to fund social cost programs based on D'Allesandro bill	References to national study (NORC 1999) which includes cost per pathological gambler. Survey of NH residents on prevalence of each of the 10 criteria of problem gambling. Benefits of revenue and economic development estimated to exceed costs.
Social Costs	Crime	Not provided, not discussed, or no analysis conducted.	No systematic analysis conducted. Letter provided from Chief of Police in Meadows host community indicating no increase in Crime; newspaper article on police chief in Bangor, Maine dismissing impact. 1% of revenues to fund local public safety.	1% of revenues to fund local public safety	Literature reviewed, with no specific estimate of changes in Crime in New Hampshire.
Social Costs	Casino Management of Problem Gamblers	Have internal training management and controls. Self-banning of pathological gamers. Regulatory environment plays a key role. Social services plays key role.	Have internal training management and controls. Self-banning of pathological gamers. Regulatory environment plays a key role (e.g. licensing of workers)	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	Developers indicated, by inference, that the casino would implement in-house policies and employee training to identify problem gamers and allow for self-identification and removal.

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Social Costs	Casino Management of Crime (e.g. casino security measures)	Not provided, not discussed, or no analysis conducted.	Casino security measures (based on Meadows) includes 96 fulltime and 13 part time security officers (at least 21 per shift) plus 37 mostly part time for the track. See also detailed information provided on protocols, technology, and compliance.	Not provided, not discussed, or no analysis conducted.	Developers indicated that the Casino might take a variety of actions to limit criminal behavior including but not limited to a secure controlled access point to the main facility (i.e., direct off-ramp), electronic surveillance of gaming floors, lobbies, elevators, and parking structures, an on-site security staff the monitors electronic surveillance on the gaming floor and that patrols the interior and exterior of the facility at the resort's cost, key code access to space, training employees to recognize the signs of problem and pathological gambling with instructions to "cut off" these customers and refer them to help lines."
Market Area and Demand Assumptions	Estimated Market Area	See Maps --> 50,000 people within 60 minute drive. With primary driver being within a 30 minute drive.	See Maps --> 3 million potential adult gamblers. Proprietary Gravity model used to identify individuals within 30, 60 and 90 miles.	Competitor market New England plus New York border, 5 million people	See Maps --> 8 million adults within 150 minutes. 3 million adults within 60 minutes.
Market Area and Demand Assumptions	Share of Market Demand from Massachusetts	Not Applicable	Estimated 75% of market from Massachusetts	Approximately 50% of population from Massachusetts.	81% of patrons will come from out of state, with most coming from Massachusetts.

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Market Area and Demand Assumptions	Estimated Visitations	3.3 million visits per year.	4 to 5 Million visits per year	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	2.1 Million
Market Area and Demand Assumptions	Propensity to Gamble	Not provided, not discussed, or no analysis conducted.	36% in Rockingham, 29% Inside 128. Estimates based on proprietary surveys and analyses of industry databases.	Established facility with access to 5 million people 'assumed to gamble at average propensity of Northeastern US.'	Estimates based on total revenues, not on individual behavior. However, statewide 23% estimated to gamble
Economic Development	Capital Investment	Phase 1: \$7 million, 2: \$17 million, 3: \$50 million	\$450 m in Rockingham	\$100 million	\$300m capital investment, \$140 m in construction
Economic Development	Construction Jobs	Not provided, not discussed, or no analysis conducted.	1,100	150	1,211
Economic Development	Permanent Jobs	155	1000. Additional 600 if commercial table games with dedicated charitable revenues.	400	4,042
Economic Development	Indirect/Induced Jobs	Not provided, not discussed, or no analysis conducted.	No systematic analysis conducted	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	2,843

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Economic Development	Average Wage of New Jobs	\$21,585	\$42,000 to \$44,000 based on Meadows Statistics	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	\$39,000 for Casino Operations only, excluding tips
Economic Development	New Jobs as % of Avg Annual Wage in NH	51% of NH Average annual Wage. Should be noted that average wage in Berlin is significantly lower than in the state.	Approximately 100%	Not provided, not discussed, or no analysis conducted. Proposal is in initial stages with further analysis to be conducted.	91%
Economic Development	Annual Payroll	\$3.3 million	Estimated at \$42 million	\$8 million	\$126m
Economic Development	Drawn from local labor	Not provided, not discussed, or no analysis conducted.	95%	Only a few managers and technical types to be imported.' Nearly all jobs expected to be filled by local residents.	90%
Economic Development	% Year round full time jobs	Not provided, not discussed, or no analysis conducted.	80%	No analysis provided, but no grat seasonality hypothesized.	70 to 85%
Economic Development	Partnership with local businesses	Economic development for Berlin means all impacts are positive	Joint Promotional Arrangements with area businesses	Any hotel development deferred pending rise in existing hotels occupancy rates.	Casino customer would not be local, therefore no impact on local business
Economic Development	Impact on Other Businesses	Not provided, not discussed, or no analysis conducted.	Within 1 mile of Meadows facility, 1 new hotel opened and 2 more under construction; support from PA local officials and area chamber on positive impact on other businesses.	No specific NH analysis conducted. Hypothesize that the export focus (share of individuals coming from Massachusetts) would limit impact.	IMPLAN modeling suggests net increase in local business due to capture of Massachusetts market and growth in discretionary spending.

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Economic Development	Infrastructure	Economic development for Berlin means all impacts are positive	Exit 1 already developed for race track, so no significant additional costs anticipated	Assumed that any and all necessary upgrades to local infrastructure assumed to be funded by gaming developer.	Need commuter rail to realize full potential
Economic Development	Branding/State's Image	Not provided, not discussed, or no analysis conducted.	Proposal developer noted long history of gambling at Rockingham Park	Not provided, not discussed, or no analysis conducted.	Not provided, not discussed, or no analysis conducted.
Regulatory Environment	Type or Regulatory Environment	Not provided, not discussed, or no analysis conducted.	Provided a variety of information and data on regulatory environments across the country and summarized in memo	No specific analysis conducted. Assumed similar to best-performing 'current US VL programs: DE/PA/WF'	No NH specific analysis conducted. Proposal did suggest that licensing and regulation and enforcement and investigation should be conducted by different state authorities.
Regulatory Environment	Costs of Regulation	Not provided, not discussed, or no analysis conducted.	Applicant covers all out of pocket costs of licensing. State pays for regulatory start-up costs and on-going regulatory costs from licensing fee (\$50 million) and state distribution of revenues (40 percent). Information provided on budgets and organizational structure and functions in other jurisdictions.	Applicant covers all out of pocket costs of licensing and regulatory start-up costs.	Estimates new costs between \$3.3 and \$11m. Calculated based on experience in other states.

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